

Tax Rate Forms

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Final Countywide Taxable Values Report 233b

Form PT-233B

Rev. 2/01

County: _____ Year: _____

Real Estate - Land

	Numbers/Parcels	Taxable Values
Residential - primary use	_____	\$ _____
Residential - not primary use	_____	\$ _____
Commercial and industrial - improved	_____	\$ _____
Agricultural (non-FAA) - improved	_____	\$ _____
Agricultural (FAA)	_____	\$ _____
Unimproved land (non-FAA)	_____	\$ _____
Total assessment of land real estate		A. \$ _____

Real Estate - Buildings, Structures, Etc.

Residential - primary use	_____	\$ _____
Residential - not primary use	_____	\$ _____
Commercial and industrial	_____	\$ _____
Agricultural	_____	\$ _____
Total assessment of structures		B. \$ _____
Total real property (A + B)		\$ _____

Personal Property

Fee-in-lieu property	_____	\$ _____
Age-based property	_____	\$ _____
Manufactured/mobile homes - primary res.	_____	\$ _____
Manufactured/mobile homes - other	_____	\$ _____
Commercial and industrial machinery	_____	\$ _____
Trade fixtures	_____	\$ _____
Other personal property	_____	\$ _____
Total personal property		\$ _____
Total personal property minus fee-in-lieu		C. \$ _____
Grand total, locally assessed property (A + B + C)		\$ _____

Certification by County Assessor and Auditor

I, _____, as County Assessor certify that the information contained herein is true and correct in compliance with UCA 59-2-913.

Signature: _____ Date: _____

I, _____, as County Auditor certify that the information contained herein is true and correct in compliance with UCA 59-2-913.

Signature: _____ Date: _____

***This information is sent in the format of a computer generated report from each county auditor to the State Tax Commission; therefore this form is not being used currently.

<p style="text-align: center;">Instructions Final Countywide Taxable Values Report 233B</p>	<p style="text-align: center;">Form PT-233B Rev. 2/01</p>
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<p>Prepared by: County Auditors and County Assessors Statutory reference: UCA §59-1-210 & Article 13, Section 11, Utah Constitution, Due date: February 27</p>
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General Information

Report 233b gives the countywide taxable values for locally assessed properties, including real and personal properties, as reported by county assessors on the assessment rolls.

The report is divided into three basic sections, reporting locally assessed values for:

- 1) real estate
- 2) buildings, structures, etc.
- 3) personal property

These categories are further broken down into subcategories.

The report is prepared by county assessors and reviewed by county auditors.

Instructions

Parcel counts and taxable values should be reported in the appropriate categories based upon the following definitions.

Real Estate – Land

Real Estate is the possession of, claim to, ownership of, or right to the possession of land and improvements, as explained in UCA §59-2-102.

Residential – Primary Use

Primary residential land is assessed at 55 percent of market value. Land in excess of one acre should be reported as Unimproved Land. (UCA §59-2-103)

Residential – Not Primary Use (Improved)

Secondary improved residential land is assessed at 100 percent of market value. This includes property such as vacation homes and time-share property.

Commercial and Industrial (Improved)

The Land upon which a commercial or industrial improvement is being assessed.

Agricultural – Non FAA (Improved)

Land Valued at 100% of market value upon which an agricultural improvement is being assessed.

Agricultural – FAA

Land assessed under the Farmland Assessment Act, including barns, sheds, greenhouses, dams, ponds. Does not include land that is under the farmhouse.

Unimproved Land (Non FAA)

All Vacant Land assessed at 100% of market value.

Homesite Value

There is not a category for homesite value. What was formerly reported as homesite value is to be reported in one of the other categories as appropriate. In most cases this will be Residential Primary. However, if it is land that a commercial building sits on, it should be reported as Commercial and Industrial.

Real Estate – Buildings, Structures, Etc.**Residential – Primary Use**

All primary residential buildings and structures assessed at 55% of market value. (UCA §59-2-103)

Residential – Not Primary Use

All secondary residential buildings and structures assessed at 100% of fair market value (e.g., vacation homes, secondary homes and time-shares.)

Commercial and Industrial

All buildings and structures coded as commercial or industrial are assessed at 100% of Market Value.

Agricultural

All buildings and structures coded as agricultural use are assessed at 100% of Market Value.

Personal Property**Fee-in-lieu Property**

Report all registered motor vehicles that weigh 12,001 pounds or more and are subject to the uniform fee in this category. (UCA §59-2-405)

Age-based Property

Report all registered motor vehicles that weigh 12,000 pounds or less and are subject to the age-based uniform fee in this category. (UCA §59-2-405.1)

Manufactured/Mobile Homes – Primary Use

All manufactured or mobile homes permanently affixed to real estate will be valued at 55% of market value. (UCA §59-2-602)

Manufactured/Mobile Homes – Other

All other manufactured or mobile homes classified as Personal Property are valued at 100% of market value.

Parcel & Building Counts

Parcel Counts

Report the number of separately assessed parcels of land for each category. If a parcel is assessed under more than one category, it should be included in those categories.

Number – Buildings & Structure

Report the number of separately assessed buildings and structures. Where there is more than one building or structure on a parcel of land, each building or structure is counted separately.

Number – Personal Property

Fee-in-lieu Property – The number of individual registered vehicles subject to the age-based uniform fee.

Manufactured/Mobile Homes (Primary Residential Use) – The number of individual manufactured or mobile homes being assessed. Where more than one mobile home is assessed on a single account or assessment record, each mobile home is counted.

Mobile Homes (Other) – These shall be treated the same as the previous category.

Verification

The State Tax Commission does not verify the data on this form. The data is used to develop parcel counts and other information provided to the state auditor's office.

Year-End Statement of Taxes Charged, Collected, and Disbursed
Report 750

Year-End Statement of Taxes Charged, Collected, and Disbursed
Report 750

County: _____ **Year:** _____

[illegible]**Certification by County Treasurer**

I, _____, as County Treasurer certify that the information contained herein is true and correct.

Signature: _____ Date: _____

Please refer to instructions for additional information

Page 2

Instructions Year-end Statement of Taxes Charged, Collected & Disbursed Report 750	Form PT-750 pt-750-inst.doc Rev. 11/01
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Prepared by:	County Treasurers
Statutory reference:	UCA §59-1-210 & Article 13, Section 11, Utah Constitution
Due date:	March 31

General Instructions

1. Taxing Entities

List the various taxing entities in your county.

2. Year-End Real Property Value

Enter the taxable value of all locally assessed real property after all county board of equalization changes have been posted to the assessment roll. The value reported in this column should equal the value reported by county auditors on Report 233b

3. Year-End Centrally Assessed Property Values

Enter the taxable value of all centrally assessed property after all changes have been posted to the assessment roll. The value reported in this column should equal the value reported by county auditors on Report 233b. Centrally assessed values will be reported as of December 31.

4. Total Real and Centrally Assessed RDA Value

This value is based on the real and centrally assessed increment taken by the RDA agency and not the increment available. The RDA value is calculated by dividing the entity's dollar increment received by the entity's tax rate

5. Total Adjusted Real and Centrally Assessed Value

Total columns 2 and 3 then subtract column 4 and place the results here.

6. Year-End Personal Property Value

Enter the taxable value of all locally assessed personal property after all changes have been posted to the assessment roll. The value reported in this column should equal the value reported by county auditors on Report 233b

7. Personal Property RDA Value

This value is based on the personal property increment taken by the RDA agency and not the increment available. The RDA value is calculated by dividing the entity's dollar increment received by the entity's tax rate

- 8. Total Adjusted Personal Property Value**
Subtract column 7 from column 6. Place the results here.
- 9. Total Adjusted Value**
Add columns 5 and 8 and enter the results here. **Do not** include fee-in-lieu, rail car and State assessed commercial vehicles (motor carrier) values. If your computer system does not allow you to separate these values, then include the revenue in the taxes collected in column 19. The total value reported in this column should equal the value reported by county auditors on Report 233b.
- 10. Current Year Real & Centrally Assessed Property Tax Rate**
Enter the approved tax rate used to calculate the revenue for real and centrally assessed property being reported on this report.
- 11. Prior Year Personal Property Tax Rate**
Entered the prior year's approved tax rate used to calculate the revenue for personal property being reported on this report.
- 12. Real & Centrally Assessed Property Taxes Charged**
Multiply column 5 by column 10 and enter the result here.
- 13. Personal Property Taxes Charged**
Multiply column 8 by column 11 and enter the result here.
- 14. Total Taxes Charged**
Add columns 12 and 13 and place the result here.
- 15. Unpaid Taxes**
Enter all unpaid taxes for real, personal, and centrally assessed property that were assessed for the current year. Include all preliminary and subsequent tax sales as well as all delinquent taxes and deferrals.
- 16. Abatements**
Enter the amount of tax relief granted for veteran and blind exemptions, additional 20 percent circuit breaker and indigent abatements. Only the non-reimbursable portion (additional 20%) of the Home-owners Circuit Breaker Tax Credit is included. Do not include the state reimbursed portion.
- 17. Other**
Enter all other forms of relief including adjustments for double assessments, illegal and erroneous assessments, overages and shortages, adjustments granted by the county governing body, corrections of errors and omissions, pumping plant exemptions, the taxes resulting from the difference between the current and previous year's tax rates for

personal property and any other adjustments.

18. Total Relief

Add columns 15, 16 and 17, and enter the result here.

19. Total Taxes Collected

Subtract column 18 from column 14 and enter the result here. This is the total taxes collected and distributed to the entity for the current year. If amounts are collected but not distributed, provide a footnote identifying such amounts. Include the state reimbursed portion of the Home-owners Circuit Breaker tax Credit.

20. Annual Collection Rate

Divide column 19 by column 14 and enter the result here. The calculation is carried out two decimal places.

21. Fee-in-lieu

Enter all revenue collected for property subject to an in-lieu fee and motor vehicle subject to the aged based fee.. This column should also include revenue collected by the State Tax Commission for utility companies' motor vehicles and distributed to the counties. This includes registered property subject to the following:

1. Uniform fee based on age.
2. Uniform fee based on value (1.5%)
3. Aerial applicators (.2%)
4. All other aircraft (.4%)

22. Miscellaneous Collections

Enter all collections other than those for current taxes charged. Miscellaneous collections should include such items as FAA rollback taxes and interest earnings. Prior year collected amounts refunded to taxpayers as the result of a tax commission decision or court order should be included in this column as a negative amount. This column should also include revenue received from state assessed commercial vehicles (motor carriers).

23. Delinquent Taxes

Enter all delinquent property tax revenues for real, personal and centrally assessed properties for the previous years.

24. Interest & Penalty

Enter all penalties and interest charged and collected on delinquent taxes. This includes the two percent penalty for real property as well as the penalties collected on personal property pursuant to UCA 59-2-307 & 309. Any collections to cover administration costs such as title searches for the May tax sale or costs in conjunction with seizure and sale procedures should be accounted for in this column.

**County Auditor Annual Report
on Redevelopment Project Areas
Report 700**

Form PT-700
pt-700.xls Rev. 03/04

County: _____ Year: _____

Redevelopment agency, project area: _____

Taxable value

1A Locally assessed real property value

1B Personal property value

1C Centrally assessed property value

1D Total taxable value (add lines 1A, 1B and 1C)

Base Taxable Value

2A Locally assessed real property value for the base year.

Base taxable value adjustments:

a Qualifying decrease in the minimum basic levy ; 17B-4-1006 (1)(b)

b a statute enacted by the Legislature ; 17B-4-1006 (2)(a)(I)(A)

c a judicial decision ; 17B-4-1006 (2)(a)(I)(B)

d an order from State Tax Comm. (59-2-704(2)) ; 17B-4-1006 (2)(a)(I)(C)

e change in exemption under Utah Constitution ; 17B-4-1006 (2)(a)(I)(D)

f incr. / decr. in the percentage of fair market value 17B-4-1006 (2)(a)(I)(E)

g decrease in cert. tax rate(59-2-924 (2)(c) or (d)(I)) ; 17B-4-1006 (2)(ii)(A)

h Total adjustments (add lines a through g)

2B Locally assessed real property value (line 2A minus h)

2C Locally assessed personal property value

2D Centrally assessed property value

2E Base taxable value (add lines 2B, 2C and 2D)

Marginal Value

3 Marginal Value (line 1D minus line 2E)

Incremental Value

4 Percentage of adjusted tax increment

5 Incremental value (line 3 x line 4)

6 Combined Incremental Value (if applicable)

Tax Increment

7 Redevelopment Project Tax Rate

8 Tax increment available (line 5 or line 6) x (line 7)

9 Tax increment **requested** by the Redevelopment agency

10 Adjustments - Please explain

11 Tax Increment **actually paid** to the Redevelopment Agency

12 Tax increment value based on tax increment actually paid (line 11 divided by line 7)

Signature of County Auditor

Name (please print): _____

Signature: _____ Date: _____

Return completed report to:

State Tax Commission
Property Tax Division, Third Floor
210 N 1950 W
SLC, UT 84134

Instructions County Auditors Annual Report 700 Report	Form PT-700 pt-700-inst.doc Rev. 11/03
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Prepared by:	County Auditor
Statutory Reference:	UCA §17A-2-1218
Due date:	March 31

General Instructions

1. — Taxable Value

Line 1A — Locally Assessed Real Property

Enter the value of locally assessed real property from the previous year's tax roll. (Previous year's 697 real property taxable value)

Line 1B — Locally Assessed Personal Property

Enter the value of locally assessed personal property from the previous year's tax roll. (Previous year's 697 personal property table values)

Line 1C — Centrally Assessed Property

Enter the value of centrally assessed property as provided by the State Tax Commission.

Line 1D — Total Taxable Value

Add lines 1A, 1B, and 1C, and enter the total here.

2. — Base Taxable Value

Line 2A — Locally Assessed Real Property

Enter the value of locally assessed real property for the base year.

Line a — Qualifying Decrease in minimum basic school levy –

Utah Code Ann. § 17B-4-1006 (1)(b)

If there is a "Qualifying Decrease" in the minimum basic school levy under Section 59-2-902 that would result in reduction of the amount of tax increment to be paid to an agency; the base taxable value of taxable property within the project area shall be reduced to the extent necessary, even below zero, to provide the agency with approximately the same amount of tax increment that would have been paid had the qualifying decrease not occurred.

Line b — A statute enacted by Legislature - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(A)

An increase or decrease resulting from a statute enacted by the Legislature or by the people through an initiative.

Line c — A judicial decision - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(B)

An increase or decrease resulting from a judicial decision.

Line d — An adjustment based on factoring - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(C)

An increase or decrease resulting from an order from the State Tax Commission to a county to adjust or factor its assessment rate under Subsection 59-2-704(2).

Line e — Change in exemption - Utah Code Ann. § 17-4-1006 (2)(a)(i)(D)

Any increases or decreases resulting from a change in exemption provided in Utah Constitution Article XIII, Section 2 or Section 59-2-103

Line f — Change in fair market value - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(E)

Any increases or decreases resulting from the changes in the percentage of fair market value, as defined under Section 59-2-102

Line g — Decrease in county's certified tax rate - Utah Code Ann. § 17B-4-1006 (2)(a)(ii)

The base taxable value shall be adjusted to the extent necessary, even below zero, to provide the agency with approximately the same amount of revenue the agency would have received without a reduction in the county's certified tax rate if in that year there is a decrease in the county's certified tax rate under Section 59-2-924 (2)© or (d)(i). This adjustment may be made if the decrease is more than 20% or the reduction would result in a reduction of the amount of tax increment to be paid to the agency.

Line h — Total adjustments

Add all the adjustments from line a through g.

Line 2B — Adjusted Locally Assessed Real Property

Subtract line h from line 2A.

Line 2C — Locally Assessed Personal Property Value

Enter the value of locally assessed personal property for the base year.

Line 2D — Centrally Assessed Property Value

Enter the value of centrally assessed property, as received from the State Tax Commission, for the base year.

Line 2E — Base Taxable Value

Add line 2B, 2C and 2D.

Line 3 — Marginal Value

Subtract Line 2E from 1D and enter the result here.

Line 4 — Percentage of adjusted tax increment

Tax increment adjustment based on the provisions listed Sections 17B-4-1003 or 17B-4-1004.

Line 5 — Incremental Value

Multiply line 3 by line 4 and enter the result here.

Line 6 — Combined Incremental Value

Enter the combined incremental value, if applicable, per Section 17B-4-503(b).

Line 7 — Redevelopment Project Tax Rate

The tax rate for the redevelopment project.

Line 8 — Tax Increment Available

If the redevelopment agency has combined incremental value, then multiply line 6 by line 7; otherwise, multiply line 5 by line 7.

Line 9 — Tax Increment Requested

Enter the tax increment requested by the redevelopment agency.

Line 10 – Adjustments

Any type of adjustments made to the tax increment requested, including treasurer's relief or delinquencies.

Line 11— Tax Increment Actually Paid

Enter the tax increment actually paid to the redevelopment agency by the county treasurer.

Line 12 — Tax Increment Value

Line 10 divided by line 7. This number shall be the same number as reported by the county treasurer on Report 750.

Redevelopment Agency Worksheet Report 695A

Form PT-695a
pt-695a.xls Rev. 4/01

County: _____ Redevelopment Agency: _____

Redevelopment Project Tax Rate

Entities Affected by the RDA	Last Year's Tax Rate

1. Redevelopment Agency Area Tax Rate (sum of last year's rates)

Taxable Value

2A Locally assessed real property value	
2B Personal property value	
2C Centrally assessed property value	
2D Total taxable value (add lines 2A, 2B, and 2C)	

Base Taxable Value

3A Locally assessed real property value		
Adjustments to base taxable value		
a Qualifying decrease in minimum basic levy [17B-4-1006(1)(b)]		
b Statutes enacted by the legislature [17B-4-1006(2)(a)(i)(a)]		
c Judicial decisions [17B-4-1006(2)(a)(i)(b)]		
d Orders from State Tax Commission [17B-4-1006(2)(a)(i)(c)]		
e Exemption change under Utah Constitution [17B-4-1006(2)(a)(i)(b)]		
f Inc/dec in percentage of fair market value [17B-4-1006(2)(a)(i)(e)]		
g Certified tax rate decrease [59-2-924(2)(c) or (d)(i) & 17B-4-1006(2)(ii)(a)]		
h Total adjustments (add lines a through g)		
3B Locally assessed real property adjusted value (line 3A minus h)		
3C Locally assessed personal property value		
3D Centrally assessed property value		
3E Base taxable value (add lines 3B, 3C and 3D)		

Marginal and Incremental Value

4 Marginal value (line 2D minus line 3E)	
5 Percentage of adjusted tax increment	
6 Incremental value (line 4 multiplied by line 5)	
7 Combined incremental value (if applicable)	
8 Tax increment requested by the redevelopment agency	
9 Incremental value based on the requested increment (line 8 divided by line 1)	

Redevelopment Agency Current Year Value

10 The lesser of (line 6 or line 7) or line 9 (enter on column 6 of Report 697)	
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Certification of County Auditor

I, _____, as County Auditor certify that the information contained herein is true and correct in compliance with UCA 59-2-913.

Signature: _____ Date: _____

Instructions Redevelopment Agency Worksheet Report 695A	Form PT-695a pt-695a-inst.doc Rev. 04/01
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Prepared by: Statutory reference: Due date:	County auditor UCA §59-2-913 & 924 June 8
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General Information

This worksheet is to be completed by county auditors for each redevelopment agency. It calculates a value adjustment to subtract from the value of each affected taxing entity.

Instructions

Line 1 — Total Area Rate

County auditors will list all of the taxing entities that are within the boundaries of the RDA in the first column, and each taxing entity's total tax rate for the previous year in the second column. Add all of last year's tax rates and enter the total on line 1.

Line 2A — Locally Assessed Real Property

Enter the value of locally assessed real property from the current year's tax roll.

Line 2B — Locally Assessed Personal Property

Enter the value of locally assessed personal property from the current year's tax roll.

Line 2C — Centrally Assessed Property

Enter the value of centrally assessed property as provided by the State Tax Commission.

Line 2D — Total Current Year RDA Value

Add lines 2A, 2B and 2C, and enter the total here.

Line 3A — Locally Assessed Real Property

Enter the value of locally assessed real property for the base year.

Line a — Qualifying Decrease in minimum basic school levy – Utah Code Ann. § 17B-4-1006 (1)(b)

If there is a "Qualifying Decrease" in the minimum basic school levy under Section 59-2-902 that would result in reduction of the amount of tax increment to be paid to an agency; the base taxable value of taxable property within the project area shall be reduced to the extent necessary, even below zero, to provide the agency with approximately the same amount of tax increment that would have been paid had the qualifying decrease not occurred.

Line b — A statute enacted by Legislature - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(A)

An increase or decrease resulting from a statute enacted by the Legislature or by the people through an initiative.

Line c — A judicial decision - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(B)

An increase or decrease resulting from a judicial decision.

Line d — An adjustment based on factoring - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(C)

An increase or decrease resulting from an order from the State Tax Commission to a county to adjust or factor its assessment rate under Subsection 59-2-704(2).

Line e — Change in exemption - Utah Code Ann. § 17-4-1006 (2)(a)(i)(D)

Any increases or decreases resulting from a change in exemption provided in Utah Constitution Article XIII, Section 2 or Section 59-2-103

Line f — Change in fair market value - Utah Code Ann. § 17B-4-1006 (2)(a)(i)(E)

Any increases or decreases resulting from the changes in the percentage of fair market value, as defined under Section 59-2-102

Line g — Decrease in county's certified tax rate - Utah Code Ann. § 17B-4-1006 (2)(a)(ii)

The base taxable value shall be adjusted to the extent necessary, even below zero, to provide the agency with approximately the same amount of revenue the agency would have received without a reduction in the county's certified tax rate if in that year there is a decrease in the county's certified tax rate under Section 59-2-924 (2)© or (d)(i). This adjustment may be made if the decrease is more than 20% or the reduction would result in a reduction of the amount of tax increment to be paid to the agency.

Line h — Total adjustments

Add all the adjustments from line a through g.

Line 3B — Adjusted Locally Assessed Real Property

Subtract line h from line 3A.

Line 3C — Locally Assessed Personal Property Value

Enter the locally assessed personal property value for the base year.

Line 3D — Centrally Assessed Property Value

Enter the centrally assessed property value for the base year as reported by the State Tax Commission.

Line 3E — Total Base Year Value

Add lines 3B, 3C and 3D and enter the total here.

Line 4 — Marginal Value

Subtract line 3E from line 2D and enter the result here.

Line 5 — Percentage of Adjusted Tax Increment

Tax increment adjustment based on the provisions listed Sections 17B-4-1003 or 17B-4-1004.

Line 6 — Incremental Value

This is the adjusted incremental value, multiply line 4 by line 5 and enter the result here.

Line 7 — Combined Incremental Value

Enter the combined incremental value, if applicable, per Section 17B-4-503(b).

Line 8 — Tax Increment Requested by the Redevelopment Agency

Enter the tax increment requested by the redevelopment agency.

Line 9 — Incremental Value

This is the incremental value based on the tax increment requested, calculated by dividing line 8 by line 1.

Line 10 — Redevelopment Agency Current Year Value

This figure is the lesser of line 9 or (line 6 or line 7). It is also entered on Report 697 column 6.

Verification

1. The State Tax Commission verifies line 1 by looking at the previous year's area tax rates as found in last year's nomenclature book.
2. County auditors are expected to prepare and to verify this form.

<p>Report of the Sum of Taxable Values by the County Assessor</p> <p>Report 697</p>	<p>Form PT-697</p> <p>pt-697.xls Rev. 2/01</p>
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<p>Report of the Sum of Taxable Values by the County Assessor</p> <p>Report 697</p>	<p>Form PT-697</p> <p>pt-697.xls Rev. 2/01</p>
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County: _____ **Year:** _____

[illegible]

Note: The value listed for redevelopment is the total of all the RDAs (Report 695A) affecting the entity.

Certification by County Assessor and Auditor

I, _____, as County Assessor certify that the information contained herein is true and correct.

Signature: _____ Date: _____

I, _____, as County Auditor have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Report of the Sum of Taxable Values by the County Assessor Report 697	Form PT-697 pt-697-inst.doc Rev. 2/01
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Prepared by:	County Assessor
Statutory reference:	UCA §59-2-924, Tax Commission Administrative Rule R884-24P-24
Due date:	June 1

General Information

Report 697 is the summary of taxable values for each entity adjusted for redevelopment value.

The form lists property values by entity and is filled out by county assessors with assistance from county auditors. Once completed, this form is sent to county auditors. The values are reported as follows:

- real property as of January 1, as assessed by county assessors;
- personal property includes all that has been billed for the current year; estimates for unbilled property shall also be included in this figure; and,
- centrally assessed property value of properties as assessed and reported by the State Tax Commission.

Instructions

Column 1– Taxing Entities

List all the taxing entities in the county.

Column 2 – Real Property

Enter the taxable value of land and buildings assessed by county assessors (do not include attached personal property).

Column 3 – Personal Property

Enter the taxable value of personal property assessed by county assessors on the rolls as of the lien date, plus any estimate for property not yet taxed. This column does not include fee-in-lieu or age-based property.

Column 4 – Centrally Assessed Property

Enter the taxable value of property assessed by the State Tax Commission. The State Tax Commission reports these values to county auditors by June 8 (59-2-802 UCA). This column includes car and bus values.

Column 5 – Sum of Taxable Values

Add columns 2, 3, and 4 and enter the total here.

Column 6 – Total RDA Value

Enter the current RDA value from line 9 of Report 695A.

Column 7 – Adjusted Taxable Value

Subtract column 6 from column 5 and enter the total here. This number will be used on reports 694 or 694A, 712A and 713 or 713A.

Note

It is important that county auditors review the methods and procedures used by county assessors. For example: over-estimating personal property results in revenue shortfalls.

<p>Report of New Growth Adjustments</p> <p>Report 714</p>	<p>Form PT-714</p> <p>pt-714.xls Rev. 2/01</p>
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<p>Report of New Growth Adjustments</p> <p>Report 714</p>	<p>Form PT-714</p> <p>pt-714.xls Rev. 2/01</p>
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County: _____ **Year:** _____

[illegible]

Certification by County Assessor and Auditor

I, _____, as **County Assessor** certify that the information contained herein is true and correct in compliance with UCA 59-2-924.

Signature: _____ Date: _____

I, _____, as **County Auditor** have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Report of New Growth Adjustments Report 714	Form PT-714 pt-714-inst.p65 Rev. 2/01
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Prepared by:	County Assessor
Statutory reference:	UCA §59-2-906.3 & 924
Due date:	June 1

General Information

Report 714 shows the change in value by entity, which occurred between the previous and current tax year as a result of factoring, reappraisal, or legislative changes. This report is used in the calculation of new growth.

County assessors are to report any increase or decrease that occurred in the county from a factoring order, reappraisal or legislative change. Values should be listed by entity.

Instructions

Column 1 – Taxing Entity

List each taxing entity in the county.

Column 2 – Increase or Decrease In Taxable Value From Reappraisal

Enter the amount of each entity's total value resulting from reappraisal.

Column 3 – Increase or Decrease In Taxable Value From Factoring

Enter the amount of each entity's total value resulting from factoring orders issued by the county or the State Tax Commission. This helps ensure that the entity is following any orders issued by the courts, the State Tax Commission or the local board of equalization.

Column 4 – Increase or Decrease In Taxable Value

Enter the amount of each entity's total value resulting from legislative changes and/or court decisions.

Column 5 – Total Value Adjustments

Add the amounts in columns 2, 3 and 4 and enter the total here. Transfer this total to column 4 of Report 712A.

<p align="center">Calculations of New Growth 712A Report</p>	<p align="center">Form PT-712a pt-712a.xls Rev. 11/03</p>
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<p align="center">Calculations of New Growth 712A Report</p>	<p align="center">Form PT-712a pt-712a.xls Rev. 11/03</p>
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County: _____ **Year:** _____

[illegible]

Certification by County Auditor									
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I, _____, certify that the information contained herein is true and correct.

Signature: _____ Date: _____

Instructions Calculations of New Growth Report 712A	Form PT-712a pt-712a-inst.doc Rev. 11/03
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Prepared by: County Auditor Statutory reference: UCA §59-2-924, Tax Commission Administrative Rule R884-24P-24K Due date: June 1
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General Information

Report 712A calculates the amount of new growth within the entity from one tax year to the next.

New growth is adjusted for “growth” due to factoring orders, reappraisals or any other adjustments to existing assessed values and also by the annexations into or out of the entity.

Actual New Growth

Actual new growth is the current year’s preliminary value adjusted for redevelopment tax increment plus or minus changes in value due to reappraisal, factoring and legislative changes, or court orders minus previous year’s taxable value adjusted for redevelopment tax increment.

New Growth

New growth will be equal to actual new growth or net annexation value, based on the conditions for annexations. Please refer to State Tax Commission Rule R884-24P-24K.

Instructions

Column 1 – Taxing Entities

Enter the names of the taxing entities in the county. Each taxing entity should be listed and a separate calculation for new growth will be performed for each entity.

Column 2 – Last Year’s Adjusted Taxable Value

Enter the value for each entity from column 9 of Report 750. This number is the total year-end locally assessed and centrally assessed value adjusted by the RDA value. While this value is taken from the TC 750, it must be the same value adjusted by RDA as was submitted by the county auditor on the prior year’s TC 233B.

Column 3 – Current Year’s Adjusted Taxable Value

Enter the amount from column 7 of Report 697. This amount is the total current year locally assessed and centrally assessed value adjusted by the RDA’s value.

Column 4 – New Growth Adjustment (Reappraisal, Factoring, Legislative)

Enter the amount from column 5 of Report 714. This amount is the total adjustment due to reappraisal, factoring or legislative changes.

Column 5 – Actual New growth

Enter the result of column 3 minus column 2 minus column 4.

Column 6 – Net Annexation Value

Enter the amount from column 4 of Report 710.

Column 7 – New Growth

Based on the criteria established in Rule R884-24P-24K, calculate the new growth.

<p>Net Annexations Value Report 710</p>	<p>Form PT-710 pt-710.xls Rev. 03/04</p>
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pt-710.xls Rev. 03/04

County: _____ **Year:** _____

[illegible]

Certification by County Assessor and Auditor

I, _____, as County Assessor certify that the information contained herein is true and correct.

Signature: _____ Date: _____

I, _____, as County Auditor have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Net Annexations Value Report 710	Form PT-710 pt-710-inst.doc Rev. 11/03
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Prepared by:	County Assessor
Statutory reference:	R884-24P-24
Due date:	June 1

General Information

Report 710 is used to report the value of each annexation that occurred during the previous tax year.

County assessors will complete this form with the help of county auditors.

Instructions

Column 1 – Annexation

Enter the name of the annexation, as it was recorded.

Column 2 – Current Year's Taxable Value

Enter current year taxable value of property annexed in less current year RDA value. The value of real and personal property is assessed by county assessors and the centrally assessed property value is provided by the State Tax Commission.

Column 3 – Prior Year's Taxable Value

Enter previous year's taxable value of property annexed out less year-end RDA value. The value of real and personal property is assessed by county assessors and the centrally assessed property value is provided by the State Tax Commission.

Column 4 – Net Annexation Value

Subtract column 3 from column 2 and enter the total here.

Verification

The information is reviewed and certified to be accurate by county assessors and county auditors. The State Tax Commission also verifies the information.

Single Levy Certified Tax Rate Worksheet
Report 713

Form PT-713
pt-713.xls Rev. 11/03

County: _____ **Tax Year:** _____

Taxing Entity: _____

1. Last year's property tax budgeted revenues and adjustments.		
A. Last year budgeted revenues		
B. Legislative adjustment (if any, provided by State Tax Commission)		
C. Line 1A plus or minus any adjustment on line 1B (see instructions)		
2. Adjusted value (from column 7 of Report 697)		
3. Local assessed real, personal and centrally assessed BOE adjustments		
a. Real property taxable value (from column 2 of Report 697)		
b. 3-Year real property BOE average rate (provided by the Tax Commission)		
c. Real property BOE adjustment (3b times 3a)		
d. Personal property taxable value (from column 3 of Report 697)		
e. 3-Year personal property BOE average rate (provided by the Tax Com) . .		
f. Personal property BOE adjustment (3e times 3d)		
g. Centrally Assessed taxable value (from column 4 of Report 697)		
h. 3-Year centrally assessed BOE average rate (provided by the Tax Com) . .		
i. Centrally assessed property BOE adjustment (3h times 3g)		
j. Total BOE adjustments (line 3c plus line 3f plus line 3i)		
4. Sum of valuations (line 2 less line 3j)		
5. Five-year average tax collection rate (provided by State Tax Commission; enter as decimal)		
6. Sum of valuations adjusted by collection rate (line 4 multiplied by line 5)		
7. New growth (from column 7 of Report 712A)		
8. Adjusted new growth (line 7 multiplied by line 5)		
9. Current year adjusted value (line 6 less line 8)		
10. Certified tax rate (line 1C divided by line 9; use six decimal places)		

Signature of County Auditor

I, _____, as County Auditor certify that I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Single Levy Certified Tax Rate Worksheet Report 713	Form PT-713 pt-713-inst.doc Rev. 11/03
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Prepared by:	County Auditor
Statutory reference:	UCA §59-2-924
Due date:	June 8 to the taxing entities

General Information

Report 713 calculates the certified tax rate for entities with only one fund/budget type.

On this form, the adjusted sum of values will be calculated and then used to calculate the certified tax rate.

Instructions

Line 1A – Last Year’s Budgeted Revenues

Enter the amount of revenues budgeted from the previous year. (Provided by the State Tax commission).

Line 1B – Legislative Adjustment

Enter the amount provided by the State Tax Commission. This amount differs each year based on legislative action.

Line 1C – Total

Line 1A plus or minus line 1B.

Line 2 – Adjusted Sum of Valuations

Enter the amount from column 7 of Report 697.

Line 3a – Real Property Taxable Value

Enter the real property taxable value (from column 2 of Report 697).

Line 3b – Real Property BOE Rate

Enter the real property 3 year BOE rate provided by the Tax Commission

Line 3c – Real Property BOE Adjustmen

Multiply 3a by 3b and enter the amount here.

Line 3d – Personal Property Taxable Value

Enter the personal property taxable value (from column 3 of Report 697).

Line 3e – Personal Property BOE Rate

Enter the personal property 3 year BOE rate provided by the Tax Commission

Line 3f – Personal Property BOE Adjustment

Multiply 3e by 3f and enter the amount here.

Line 3g – Centrally Assessed Taxable Value

Enter the centrally assessed property taxable value (from column 4 of Report 697).

Line 3h – Centrally Assessed Property BOE Rate

Enter the centrally assessed property 3 year BOE rate provided by the Tax Commission

Line 3i – Centrally Assessed BOE Adjustment

Multiply 3g by 3i and enter the amount here.

Line 3j – Total BOE Adjustments

Add 3c, 3f, 3i and enter the amount here

Line 4 – Sum of Valuation

Subtract line 3j from line 2 and enter the amount here.

Line 5 – Five-year Average Tax Collection Rate

Enter the five-year average property tax collection rate that is calculated and provided by the State Tax Commission.

Line 6 – Adjusted Sum of Valuation

Multiply line 5 by line 4 and enter the amount here.

Line 7 – New Growth

Enter the amount from column 7 of Report 712A.

Line 8 – Adjusted New Growth

Multiply line 7 by line 5 and enter the amount here.

Line 9 – Current Adjusted Value Minus New Growth

Subtract line 8 from line 6 and enter the amount here.

Line 10 – Certified Tax Rate

Divide line 1C by line 9 and enter the amount here. Use six decimal places.

Verification

This form is verified by the counties; it is not sent to the State Tax Commission.

**Multiple Levy
Certified Tax Rate Valuation Summary
Report 713A**

Form PT-713A
pt-713a.xls Rev. 11/03

County: _____ **Tax Year:** _____

Taxing Entity: _____

1. Adjusted value (from column 7 of Report 697)		
2. Local assessed real, personal and centrally assessed BOE adjustments . . .		
a. Real property taxable value (from column 2 of Report 697)		
b. 3-Year real property BOE average rate (provided by the Tax Commission)		
c. Real property BOE adjustment (2b times 2a)		
d. Personal property taxable value (from column 3 of Report 697).		
e. 3-Year personal property BOE average rate (provided by the Tax Com) . .		
f. Personal property BOE adjustment (2e times 2d)		
g. Centrally Assessed taxable value (from column 4 of Report 697)		
h. 3-Year centrally assessed BOE average rate (provided by the Tax Com) . .		
i. Centrally assessed property BOE adjustment (2h times 2g)		
j. Total BOE adjustments (line 2c plus line 2f plus line 2i)		
3. Sum of valuations (line 1 less line 2j)		
4. Five-year average tax collection rate (provided by the Tax Commission; enter as decimal)		
5. Adjusted sum of valuations (line 3 multiplied by line 4)		
6. New growth (from column 7 of Report 712A)		
7. Adjusted new growth (line 6 multiplied by line 4)		
8. Current adjusted value minus new growth (line 5 less line 7; to line A of Report 713B)		

Signature of County Auditor

I, _____, as County Auditor, certify that I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

<p style="text-align: center;">Instructions</p> <p style="text-align: center;">Multiple Levy Certified Tax Rate Valuation Summary Report 713A</p>	<p style="text-align: center;">Form PT-713A</p> <p style="text-align: center;">pt-713a-inst.doc Rev.11/03</p>
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Prepared by:	County Auditor
Statutory reference:	UCA §59-2-924
Due date:	June 8 to the taxing entities

General Information

Report 713A is used to calculate the adjusted value used to compute the certified tax rate. It is used in conjunction with Report 713B to calculate certified tax rates for entities with more than one fund/budget type, e.g., a school district with levies for basic program, local incentive, transportation, tort liability, voted leeway, capital outlay, and 10% additional, etc.

Only one Report 713A needs to be prepared for an entity. Report 713A calculates the adjusted value necessary to produce the certified tax rate.

County auditors shall complete the worksheet before sending it to the entities.

Instructions

Line 1 – Adjusted Valuations

Enter the amount from column 7 of Report 697 for the current year.

Line 2a – Real Property Taxable Value

Enter the real property taxable value (from column 2 of Report 697).

Line 2b – Real Property BOE Rate

Enter the real property 3 year BOE rate provided by the Tax Commission

Line 2c – Real Property BOE Adjustmen

Multiply 2a by 2b and enter the amount here.

Line 2d – Personal Property Taxable Value

Enter the personal property taxable value (from column 3 of Report 697).

Line 2e – Personal Property BOE Rate

Enter the personal property 3 year BOE rate provided by the Tax Commission

Line 2f – Personal Property BOE Adjustment

Multiply 2e by 2f and enter the amount here.

Line 2g – Centrally Assessed Taxable Value

Enter the centrally assessed property taxable value (from column 4 of Report 697).

Line 2h – Centrally Assessed Property BOE Rate

Enter the centrally assessed property 3 year BOE rate provided by the Tax Commission

Line 2i – Centrally Assessed BOE Adjustment

Multiply 2g by 2i and enter the amount here.

Line 2j – Total BOE Adjustments

Add 2c, 2f, 2i and enter the amount here

Line 3 – Sum of Valuations

Subtract line 2j from line 1 and enter the amount here.

Line 4 – Five-Year Average Tax Collection Rate

Enter the five-year average tax collection rate as calculated and provided by the State Tax Commission. Enter the amount as a decimal.

Line 5 – Adjusted Sum of Valuations

Multiply line 3 by line 4 and enter the amount here. This value is used in calculating the proposed tax rate.

Line 6 – New Growth

Enter the amount from line 7 of Report 712A.

Line 7 – Adjusted New Growth

Multiply line 6 by line 4 and enter the amount here.

Line 8 – Current Adjusted Value Minus New Growth

Subtract line 7 from line 5 and enter the amount here and on line A of Report 713B.

Verification

County auditors verify this form; it is not returned to the State Tax Commission.

Multiple Levy Certified Tax Rate Worksheet Report 713B	Form PT-713B pt-713b.xls Rev. 11/03
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County: _____ Tax Year: _____

Taxing Entity: _____

A. Current year adjusted value minus new growth (from line 8 of Report 713A)					
	1. Budget Type	2. Last Year's Budgeted Revenues (Provided by State Tax Comm.)	3. Adjustments (If any, provided by The Tax Commission)	4. Adjusted Last Year's Budgeted Revenue (Col. 2 plus or minus col. 3)	5. Certified Tax Rate (Col. 4 divided by line A)
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10.					
11.					
12.					
13.					
14.					
15.					
16.					
17.					
18.					
19.					
20.					

Certification and Signature

I, _____, as County Auditor certify that I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Multiple Levy Certified Tax Rate Worksheet Report 713B	Form PT- 713B pt-713b-inst.doc Rev. 11/03
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Prepared by:	County Auditor
Statutory reference:	UCA §59-2-924
Due date:	June 8 to the taxing entities

General Information

Once the Certified Tax Rate Valuation Summary (Report 713A) is completed, the certified tax rate can be determined.

County auditors shall prepare the entire worksheet before sending it to the individual entities.

Instructions

Line A – Current Year Adjusted Value

Enter the amount from line 8 of Report 713A.

Column 1 – Budget Type

List the budget types for which the certified tax rate is being calculated (e.g., general operations, tort liability, capital outlay, etc.).

Column 2 – Last Year's Budgeted Revenue

Enter the amount provided by the State Tax Commission.

Column 3 – Adjustments (if any)

Enter any legislative or other adjustments supplied by the State Tax Commission.

Column 4 – Adjusted Last Year's Collections

Enter the calculation of column 1 plus or minus column 2.

Column 5 – Certified Tax Rate

Divide column 4 by line A and enter the amount here. This rate should be calculated to six decimal places.

Verification

County auditors verify this form; it is not returned to the State Tax Commission.

Single Levy Proposed Tax Rate Worksheet Report 694

Form PT-694
pt-697.xls Rev. 11/03

County: _____ Tax Year: _____

Taxing Entity: _____ Levy/Fund: _____

Budgetary Information

1. **Budgeted revenue** (total budgeted revenue from Report 693)

Valuation Summary

2. Adjusted value on tax rolls (from column 7 of Report 697)	<input type="text"/>
3. Local assessed real, personal and centrally assessed BOE adjustments	<input type="text"/>
a. Real property taxable value (from column 2 of Report 697)	<input type="text"/>
b. 3-Year real property BOE average rate (provided by the Tax Commission)	<input type="text"/>
c. Real property BOE adjustment (3b times 3a)	<input type="text"/>
d. Personal property taxable value (from column 3 of Report 697)	<input type="text"/>
e. 3-Year personal property BOE average rate (provided by the Tax Com) ..	<input type="text"/>
f. Personal property BOE adjustment (3e times 3d)	<input type="text"/>
g. Centrally Assessed taxable value (from column 4 of Report 697)	<input type="text"/>
h. 3-Year centrally assessed BOE average rate (provided by the Tax Com) ..	<input type="text"/>
i. Centrally assessed property BOE adjustment (3h times 3g)	<input type="text"/>
j. Total BOE adjustments (line 3c plus line 3f plus line 3i)	<input type="text"/>
4. Sum of valuations (line 2 less line 3j)	<input type="text"/>
5. Five-year average tax collection rate (provided by State Tax Commission; enter as decimal) ...	<input type="text"/>
6. Adjusted sum of valuations (line 4 multiplied by line 5)	<input type="text"/>
7. Proposed tax rate (line 1 divided by line 6; use six decimal places)	<input type="text"/>

Certification by Taxing Entity

I, _____, as authorized agent, do hereby certify that the budgetary amount from property tax revenue listed above was adopted and approved in compliance with all requirements prescribed by law.

Signature: _____ Date: _____

Certification by County Auditor

I, _____, as County Auditor certify that I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Single Levy Proposed Tax Rate Worksheet Report 694	Form PT-694 pt-694-inst.doc Rev. 11/03
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-913
Due date:	June 22

General Information

Report 694 is used to calculate the current year's **proposed tax rate**. County auditors shall complete **all** but Lines 1 and 7 **before** sending the tax rate worksheet to each taxing entity.

Instructions

Line 1 – Budgeted Revenue

Enter the amount of budgeted property tax revenue for the current calendar year from the Report 693.

Line 2 – Adjusted Value on Tax Rolls

Enter the amount from column 7 of Report 697. This value is the total locally and centrally assessed values adjusted by RDA values.

Line 3a – Three-Year BOE Average Rate

Line 3a – Real Property Taxable Value

Enter the real property taxable value (from column 2 of Report 697).

Line 3b – Real Property BOE Rate

Enter the real property 3 year BOE rate provided by the Tax Commission

Line 3c – Real Property BOE Adjustmen

Multiply 3a by 3b and enter the amount here.

Line 3d – Personal Property Taxable Value

Enter the personal property taxable value (from column 3 of Report 697).

Line 3e – Personal Property BOE Rate

Enter the personal property 3 year BOE rate provided by the Tax Commission

Line 3f – Personal Property BOE Adjustment

Multiply 3e by 3f and enter the amount here.

Line 3g – Centrally Assessed Taxable Value

Enter the centrally assessed property taxable value (from column 4 of Report 697).

Line 3h – Centrally Assessed Property BOE Rate

Enter the centrally assessed property 3 year BOE rate provided by the Tax Commission

Line 3i – Centrally Assessed BOE Adjustment

Multiply 3g by 3i and enter the amount here.

Line 3j – Total BOE Adjustments

Add 3c, 3f, 3i and enter the amount here

Line 4 – Sum of Valuations

Subtract line 3j from line 2 and enter the result here.

Line 5 – Five-Year Average Tax Collection Rate

Enter the five-year average collection rate as calculated and reported by the Tax Commission.
Enter the number as a decimal.

Line 6 – Adjusted Sum of Valuation

Multiply line 4 by line 5 and enter the result here. This amount is the sum of the valuation for the taxing entity.

Line 7 – Proposed Tax Rate

Divide line 1 by line 6 and enter the result here. This calculation should be carried to six decimal places.

Verification

County auditors review all computations made by the taxing entities and forward them to the Tax Commission.

**Multiple Levy
Proposed Tax Rate Valuation Summary
Report 694A**

Form PT-694A
pt-694a.xls Rev. 11/03

County Name: _____ **Tax Year:** _____

Entity Name: _____

1. Adjusted value on tax rolls (from column 7 of Report 697)		
2. Local assessed real, personal and centrally assessed BOE adjustments		
a. Real property taxable value (from column 2 of Report 697)		
b. 3-Year real property BOE average rate (provided by the Tax Commission)		
c. Real property BOE adjustment (2b times 2a)		
d. Personal property taxable value (from column 3 of Report 697)		
e. 3-Year personal property BOE average rate (provided by the Tax Com) ..		
f. Personal property BOE adjustment (2e times 2d)		
g. Centrally Assessed taxable value (from column 4 of Report 697)		
h. 3-Year centrally assessed BOE average rate (provided by the Tax Com) ..		
i. Centrally assessed property BOE adjustment (2h times 2g)		
j. Total BOE adjustments (line 2c plus line 2f plus line 2i)		
3. Sum of valuations (line 1 less line 2j)		
4. Five-year average tax collection rate (provided by State Tax Commission; enter as decimal) ...		
5. Adjusted sum of valuations (line 3 multiplied by line 4)		

Certification by Taxing Entity

I, _____, as authorized agent, do hereby certify that the information listed above is in compliance with all requirements prescribed by law.

Signature: _____ Date: _____

Certification by County Auditor

I, _____, as County Auditor certify that I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Instructions Proposed Tax Rate Valuation Summary Report 694A	Form PT-694A pt-694a-inst.doc Rev. 11/03
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-913
Due date:	June 22

General Information

This worksheet is used for taxing entities that have more than one budget type. By using the 694A and 694B worksheets together, the taxing entities can calculate the entity's proposed tax rates for multiple budget types.

An example is a school district that has multiple budget types and each one has a separate budget amount and tax levy.

Unlike Report 694, a separate worksheet is not needed for each line item. Rather, the county needs to complete only one Report 694A, then calculate proposed tax rates on Report 694B.

County auditors prepare the entire Report 694A before sending it to the taxing entities.

Instructions

Line 1 – Adjusted Value on Tax Roles

Enter the amount from column 7 of Report 697. This amount is the current year value (real, personal, and centrally assessed) adjusted by the RDA value.

Line 2a – Real Property Taxable Value

Enter the real property taxable value (from column 2 of Report 697).

Line 2b – Real Property BOE Rate

Enter the real property 3 year BOE rate provided by the Tax Commission

Line 2c – Real Property BOE Adjustment

Multiply 2a by 2b and enter the amount here.

Line 2d – Personal Property Taxable Value

Enter the personal property taxable value (from column 3 of Report 697).

Line 2e – Personal Property BOE Rate

Enter the personal property 3 year BOE rate provided by the Tax Commission

Line 2f – Personal Property BOE Adjustment

Multiply 2e by 2f and enter the amount here.

Line 2g – Centrally Assessed Taxable Value

Enter the centrally assessed property taxable value (from column 4 of Report 697).

Line 2h – Centrally Assessed Property BOE Rate

Enter the centrally assessed property 3 year BOE rate provided by the Tax Commission

Line 2i – Centrally Assessed BOE Adjustment

Multiply 2g by 2i and enter the amount here.

Line 2j – Total BOE Adjustments

Add 2c, 2f, 2i and enter the amount here

Line 3 – Sum of Valuations

Subtract line 2j from line 1 and enter the result here.

Line 4 – Tax Collection Rate

Enter the five-year average collection rate as calculated and provided by the State Tax Commission. Enter the number as a decimal.

Line 5 – Adjusted Sum of Valuations

Multiply line 4 by line 3 and enter the result here. This amount is the taxable value used as the denominator in the calculation of the proposed tax rate for the fund/budget type of the above entity.

Verification

County auditors verify this form; it is not returned to the State Tax Commission.

**Multiple Levy
Proposed Tax Rate Worksheet
Report 694B**

Form PT-694B
pt-694b.xls Rev. 11/03

County Name: _____ Tax Year: _____

Entity Name: _____

A. Adjusted sum of valuations (from line 5 of Report 694A)

	1. Fund/Budget Type	2. Budgeted Revenue Property Tax Revenues Only (from Report 693)	3. Proposed Tax Rate (column 2 divided by line A)
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			
14.			
15.			
B.	Total revenue (sum of column 2)		
C.	Total proposed tax rate (sum of column 3)		

Certification by Taxing Entity

I, _____, as authorized agent, do hereby certify that the budgetary amount from property tax revenue listed above was adopted and approved in compliance with all requirements prescribed by law.

Signature: _____ Date: _____

Certification by County Auditor

I, _____, as County Auditor certify that I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

<p align="center">Instructions Proposed Tax Rate Worksheet Report 694B</p>	<p align="center">Form PT-694B pt-694b-inst.doc Rev. 11/03</p>
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Prepared by:	Taxing entities, reviewed by county auditors
Statutory reference:	UCA §59-2-913
Due date:	June 22

General Information

This report is to be used in conjunction with Report 694A to calculate the proposed tax rates for multiple budget types.

County auditors will fill in line A of this report before sending it to taxing entities.

Instructions

Line A – Adjusted Sum of Valuation

Enter the amount from line 5 of Report 694A.

Column 1 – Fund/Budget Type

Enter the type of levy being proposed (e.g., basic, general debt service, tort liability, etc.)

Column 2 – Budgeted Revenue

Enter the amount of budgeted property tax revenue from Report 693.

Column 3 – Proposed Tax Rate

Divide the revenue in column 2 by the value in line A and enter the result here. This calculation should be carried out six decimal places.

Line B – Total Budgeted Revenue

Add the amounts in column 2 and enter the total here.

Line C – Total Proposed Tax Rate

Add the amounts in column 3 and enter the total here. This calculation should be carried out six decimal places.

Verification

County auditors verify the data on the form; it is not returned to the State Tax Commission.

County Assessing and Collecting levies
Tax Rate Summary
Report 693

Form PT-693-CAC
pt-693cac.xls Rev. 2/01

County: _____ **Tax Year:** _____

The county governing body for the above county has set the current year's tax rates as follows:

Purpose of Tax Rate (code from Utah Code Annotated)	Certified Tax Rate (Report 713 line 10 or 713B col. 5)	Proposed Tax Rate (Report 694 line 7 or 694B col. 3)	Maximum By Law	Budgeted Revenue (Report 694 line 1 or 694B col. 2)
Assess & Collect – State (950*) §59-2-906.1(1)			.000300	
Assess & Collect – County (955) §59-2-906.1(4)			.000200	
Mandates (960) §59-2-906.3(1)			Sufficient	
Reappraisal (965) §59-2-906.3(2)			Sufficient	
Total Tax Rate			Total Revenue	

Certification by Taxing Entity

I, _____, as authorized agent, hereby certify that this statement is true and correct and in compliance with all sections of the Utah State Code relating to the tax rate setting process.

Signature: _____ Date: _____

Title: _____ Telephone: _____

Mailing address: _____

Note: This report must be filed with the county auditor before June 22nd.

Certification by County Auditor

I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Note: County auditors must forward one copy of this report to the State Tax Commission on or before June 22nd.

* These numbers refer to the budget types used by the State Tax Commission.

<p style="text-align: center;">Instructions Tax Rate Summary Worksheets Report 693</p>	<p style="text-align: center;">Form PT-693 pt-693-inst.doc Rev. 2/01</p>
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-912 & 913
Due date:	June 22/August 17

Purpose

Report 693 summarizes an entity's proposed and certified tax rates and also provides budgeted revenue for each budget type for the taxing entities.

General Information

The summary sheets are similar in form for all the taxing entities within the state. A separate summary sheet should be used for each taxing entity.

County auditors shall fill in the certified rate for each budget type in the entity. These rates are found on either line 10 of Report 713 or column 5 of Report 713B. County auditors shall fill in these rates before the forms are sent to taxing entities.

Once the taxing entity receives Report 693, its representative completes the form.

In the **Proposed Tax Rate** column, the taxing entity enters the proposed tax rate found on either line 7 of Report 694 or column 3 of Report 694B.

For debt service, the certified tax rate is the same as the proposed tax rate and should equal the amount necessary to meet debt service. **Attach a debt service schedule with this form.**

In the **Budgeted Revenue** column, the taxing entity will enter the revenue figure shown on line 1 of Report 694 or column 2 of Report 694B.

County auditors complete two Report 693s for the county; one for the general funds and one for the assessing and collecting funds.

Taxing entity representatives sign and date the form and forward it to county auditors.

County auditors review each Report 693, sign and date each form and then forward all the Report 693s to the State Tax Commission.

Note: If the proposed tax rate is greater than the certified tax rate, the taxing entity will need to complete the truth in taxation requirements. If the entity does not want to go through truth in taxation, the entity has to reduce its proposed rate to match the certified rate and adjust the budget accordingly.

**County
Tax Rate Summary
Report 693**

Form PT-693-CNY
pt-693cny.xls Rev. 2/01

County: _____ **Tax Year:** _____

The county governing body for the above county has set the current year's tax rates as follows:

Purpose of Tax Rate (code from Utah Code Annotated)	Certified Tax Rate (Report 713 line 10 or 713B col. 5)	Proposed Tax Rate (Report 694 line 7 or 694B col. 3)	Maximum By Law	Budgeted Revenue (Report 694 line 1 or 694B col. 2)
General County Purposes (010*) §59-2-908			.003200/.003600	
Interest and Sinking Fund (020) §17-12-1			Sufficient	
County Library (030) §9-7-501			.001000	
Discharge of Judgement (190) §59-2-1328 & 1330			Sufficient	
Flood Control (040) §17-8-6			Sufficient	
County Health (540) §26A-1-117			0.000400	
Tort Liability (050) Government Immunity Act §63-30-27			0.000100	
Other (Specify purpose and statute):				
Total Tax Rate			Total Revenue	

Certification by Taxing Entity

I, _____, as authorized agent, hereby certify that this statement is true and correct and in compliance with all sections of the Utah State Code relating to the tax rate setting process.

Signature: _____ Date: _____

Title: _____ Telephone: _____

Mailing address: _____

Note: This report must be filed with the county auditor before June 22nd.

Certification by County Auditor

I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Note: County auditors must forward one copy of this report to the State Tax Commission on or before June 22nd.

* These numbers refer to the budget types used by the State Tax Commission.

<p style="text-align: center;">Instructions Tax Rate Summary Worksheets Report 693</p>	<p style="text-align: center;">Form PT-693 pt-693-inst.doc Rev. 2/01</p>
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-912 & 913
Due date:	June 22/August 17

Purpose

Report 693 summarizes an entity's proposed and certified tax rates and also provides budgeted revenue for each budget type for the taxing entities.

General Information

The summary sheets are similar in form for all the taxing entities within the state. A separate summary sheet should be used for each taxing entity.

County auditors shall fill in the certified rate for each budget type in the entity. These rates are found on either line 10 of Report 713 or column 5 of Report 713B. County auditors shall fill in these rates before the forms are sent to taxing entities.

Once the taxing entity receives Report 693, its representative completes the form.

In the **Proposed Tax Rate** column, the taxing entity enters the proposed tax rate found on either line 7 of Report 694 or column 3 of Report 694B.

For debt service, the certified tax rate is the same as the proposed tax rate and should equal the amount necessary to meet debt service. **Attach a debt service schedule with this form.**

In the **Budgeted Revenue** column, the taxing entity will enter the revenue figure shown on line 1 of Report 694 or column 2 of Report 694B.

County auditors complete two Report 693s for the county; one for the general funds and one for the assessing and collecting funds.

Taxing entity representatives sign and date the form and forward it to county auditors.

County auditors review each Report 693, sign and date each form and then forward all the Report 693s to the State Tax Commission.

Note: If the proposed tax rate is greater than the certified tax rate, the taxing entity will need to complete the truth in taxation requirements. If the entity does not want to go through truth in taxation, the entity has to reduce its proposed rate to match the certified rate and adjust the budget accordingly.

**City/Town
Tax Rate Summary
Report 693**

Form PT-693CTY
pt-693cty.xls Rev. 2/01

City/Town: _____

County: _____ **Tax Year:** _____

The Board of Trustees for the above city or town has set the current year's tax rates as follows:

Purpose of Tax Rate (code from Utah Code Annotated)	Certified Tax Rate (Report 713 line 10 or 713B col. 5)	Proposed Tax Rate (Report 694 line 7 or 694B col. 3)	Maximum By Law	Budgeted Revenue (Report 694 line 1 or 694B col. 2)
General Purposes (010*) §10-6-133/10-5-112	_____	_____	.007000	_____
Interest & Sinking Fund (020) §11-1-1	_____	_____	Sufficient	_____
Water, Light, Power, Sewage, Water Purification (140) §10-7-14.2	_____	_____	.000800	_____
Hospitals (080) (towns & 3rd class cities) §10-8-91	_____	_____	.001000	_____
Tort Liability (050) Government Immunity Act §63-30-27	_____	_____	.000100	_____
Recreation (090) §11-2-7	_____	_____	Sufficient	_____
Special Imp. Guaranty (200) §17A-3-334	_____	_____	.000200	_____
City Library (030) §9-7-401	_____	_____	.001000	_____
Judgement Recovery (190) §59-2-1328 & 1330	_____	_____	Sufficient	_____
Other (Specify purpose and statute):	_____	_____		_____
Total Tax Rate	<div></div>	<div></div>	Total Revenue	<div></div>

Certification by Taxing Entity

I, _____, as authorized agent, hereby certify that this statement is true and correct and in compliance with all sections of the Utah State Code relating to the tax rate setting process.

Signature: _____ Date: _____

Title: _____ Telephone: _____

Mailing address: _____

Note: This report must be filed with the county auditor before June 22nd.

Certification by County Auditor

I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Note: County auditors must forward one copy of this report to the State Tax Commission on or before June 22nd.

* These numbers refer to the budget types used by the State Tax Commission.

Instructions Tax Rate Summary Worksheets Report 693	Form PT-693 pt-693-inst.doc Rev. 2/01
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-912 & 913
Due date:	June 22/August 17

Purpose

Report 693 summarizes an entity's proposed and certified tax rates and also provides budgeted revenue for each budget type for the taxing entities.

General Information

The summary sheets are similar in form for all the taxing entities within the state. A separate summary sheet should be used for each taxing entity.

County auditors shall fill in the certified rate for each budget type in the entity. These rates are found on either line 10 of Report 713 or column 5 of Report 713B. County auditors shall fill in these rates before the forms are sent to taxing entities.

Once the taxing entity receives Report 693, its representative completes the form.

In the **Proposed Tax Rate** column, the taxing entity enters the proposed tax rate found on either line 7 of Report 694 or column 3 of Report 694B.

For debt service, the certified tax rate is the same as the proposed tax rate and should equal the amount necessary to meet debt service. **Attach a debt service schedule with this form.**

In the **Budgeted Revenue** column, the taxing entity will enter the revenue figure shown on line 1 of Report 694 or column 2 of Report 694B.

County auditors complete two Report 693s for the county; one for the general funds and one for the assessing and collecting funds.

Taxing entity representatives sign and date the form and forward it to county auditors.

County auditors review each Report 693, sign and date each form and then forward all the Report 693s to the State Tax Commission.

Note: If the proposed tax rate is greater than the certified tax rate, the taxing entity will need to complete the truth in taxation requirements. If the entity does not want to go through truth in taxation, the entity has to reduce its proposed rate to match the certified rate and adjust the budget accordingly.

School District Tax Rate Summary

Report 693

Form PT-693-SCH

pt-693sch.xls Rev. 03/04

School District: _____

County: _____ Tax Year: _____

The Board of Education for the above school district has set the current year's tax rates as follows:

Purpose of Tax Rate (code from Utah Code Annotated)	Certified Tax Rate (Report 713 line 10 or 713B col. 5)	Proposed Tax Rate (Report 694 line 7 or 694B col. 3)	Maximum By Law	Budgeted Revenue (Report 694 line 1 or 694B col. 2)
Basic State Levy (210*) §53A-17a-135			Calculated	
Voted Leeway (510) §53A-17a-133 Rate limit: _____ Date of election: _____			Voted	
Board App Leeway §53A-17a-134 Rate limit: _____ (515) Date of election: _____			.000400	
Board App K-3 Reading Program §53A-17a-151 Rate limit: _____ (516) Date of election: _____			.000121	
Voted Capital Leeway §53A-16-110 Rate limit: _____ (500) Date of election: _____ Date of expiration: _____			Less than 0.2% of Taxable Value	
Transportation (220) §53A-17a-127			.000300	
Recreation Facilities (090) §11-2-7			Sufficient	
Tort Liability (050) §63-30-27			.000100	
Capital Outlay (240) §53A-16-107			.002400	
10% Additional §53A-17a-145 Other (521)				
Debt (Non-G.O.) (520)			Calculated	
Judgement Recovery (190) §59-2-1328 & 1330			Sufficient	
Subtotal Tax Rate				
General Obligation Debt (230) §51-5-4			Sufficient	
Total Tax Rate			Total Revenue	

Certification by Taxing Entity

I, _____, as authorized agent, hereby certify that this statement is true and correct and in compliance with all sections of the Utah State Code relating to the tax rate setting process.

Signature: _____ Date: _____

Title: _____ Telephone: _____

Mailing address: _____

Note: This report must be filed with the county auditor before June 22nd.**Certification by County Auditor**

I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Note: County auditors must forward one copy of this report to the State Tax Commission on or before June 22nd.

* These numbers refer to the budget types used by the State Tax Commission.

<p style="text-align: center;">Instructions Tax Rate Summary Worksheets Report 693</p>	<p style="text-align: center;">Form PT-693 pt-693-inst.doc Rev. 11/03</p>
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-912 & 913
Due date:	June 22/August 17

Purpose

Report 693 summarizes an entity's proposed and certified tax rates and also provides budgeted revenue for each budget type for the taxing entities.

General Information

The summary sheets are similar in form for all the taxing entities within the state. A separate summary sheet should be used for each taxing entity.

County auditors shall fill in the certified rate for each budget type in the entity. These rates are found on either line 10 of Report 713 or column 5 of Report 713B. County auditors shall fill in these rates before the forms are sent to taxing entities.

Once the taxing entity receives Report 693, its representative completes the form.

In the **Proposed Tax Rate** column, the taxing entity enters the proposed tax rate found on either line 7 of Report 694 or column 3 of Report 694B.

For debt service, the certified tax rate is the same as the proposed tax rate and should equal the amount necessary to meet debt service. **Attach a debt service schedule with this form.**

In the **Budgeted Revenue** column, the taxing entity will enter the revenue figure shown on line 1 of Report 694 or column 2 of Report 694B.

County auditors complete two Report 693s for the county; one for the general funds and one for the assessing and collecting funds.

Taxing entity representatives sign and date the form and forward it to county auditors.

County auditors review each Report 693, sign and date each form and then forward all the Report 693s to the State Tax Commission.

Note: If the proposed tax rate is greater than the certified tax rate, the taxing entity will need to complete the truth in taxation requirements. If the entity does not want to go through truth in taxation, the entity has to reduce its proposed rate to match the certified rate and adjust the budget accordingly.

**Special Service District
Tax Rate Summary
Report 693**

Form PT-693-SSD
pt-693ssd.xls Rev. 2/01

Special Service District: _____

County: _____ **Tax Year:** _____

The Board of Trustees for the above special district has set the current year's tax rates as follows:

Purpose of Tax Rate (Code from Utah Code Annotated)	Certified Tax Rate (Report 713 line 10 or 713B col. 5)	Proposed Tax Rate (Report 694 line 7 or 694B col. 3)	Maximum By Law	Budgeted Revenue (Report 694 line 1 or 694B col. 2)
Mosquito Abatement (110*) §17A-2-909			0.000400	
Cemetery Maintenance (100) §17A-2-222			0.000400	
County Improvement District for Water, Sewage, Flood Control, Electric and Gas (140) §17A-2-312			0.000800	
Fire Protection (070) §17A-2-618			0.000800	
Water Conservancy (150) §17A-2-1423			Under Const .000100 After const .000200 Upper basin .000400 Lower basin .001000	
Tort Liability (050) §63-30-27 (Government Immunity Act)			0.000100	
Metropolitan Water (120) §17A-2-834			Sufficient	
County Service Area (570) §17A-2-414			0.001400	
Part 13, Multiple Service Area (160) §17A-2-1322			Voted	
Debt Service (020) §11-1-1			Sufficient	
Judgement Recovery (190) §59-2-1328 & 1330			Sufficient	
Other (Specify purpose and statute):				
Total Tax Rate			Total Revenue	

Certification by Taxing Entity

I, _____, as authorized agent, hereby certify that this statement is true and correct and in compliance with all sections of the Utah State Code relating to the tax rate setting process.

Signature: _____ Date: _____

Title: _____ Telephone: _____

Mailing address: _____

Note: This report must be filed with the county auditor before June 22nd.

Certification by County Auditor

I have examined the information submitted on this statement and have found it to be true and correct.

Signature: _____ Date: _____

Note: County auditors must forward one copy of this report to the State Tax Commission on or before June 22nd.

* These numbers refer to the budget types used by the State Tax Commission.

Instructions Tax Rate Summary Worksheets Report 693	Form PT-693 pt-693-inst.doc Rev. 2/01
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-912 & 913
Due date:	June 22/August 17

Purpose

Report 693 summarizes an entity's proposed and certified tax rates and also provides budgeted revenue for each budget type for the taxing entities.

General Information

The summary sheets are similar in form for all the taxing entities within the state. A separate summary sheet should be used for each taxing entity.

County auditors shall fill in the certified rate for each budget type in the entity. These rates are found on either line 10 of Report 713 or column 5 of Report 713B. County auditors shall fill in these rates before the forms are sent to taxing entities.

Once the taxing entity receives Report 693, its representative completes the form.

In the **Proposed Tax Rate** column, the taxing entity enters the proposed tax rate found on either line 7 of Report 694 or column 3 of Report 694B.

For debt service, the certified tax rate is the same as the proposed tax rate and should equal the amount necessary to meet debt service. **Attach a debt service schedule with this form.**

In the **Budgeted Revenue** column, the taxing entity will enter the revenue figure shown on line 1 of Report 694 or column 2 of Report 694B.

County auditors complete two Report 693s for the county; one for the general funds and one for the assessing and collecting funds.

Taxing entity representatives sign and date the form and forward it to county auditors.

County auditors review each Report 693, sign and date each form and then forward all the Report 693s to the State Tax Commission.

Note: If the proposed tax rate is greater than the certified tax rate, the taxing entity will need to complete the truth in taxation requirements. If the entity does not want to go through truth in taxation, the entity has to reduce its proposed rate to match the certified rate and adjust the budget accordingly.

**Resolution Adopting Final Tax Rates and Budgets
Report 800**

Form PT-800
pt-800.xls Rev. 2/01

County: _____ Year: _____

It is hereby resolved that the governing body of (entity name): _____

approves the following property tax rate(s) and revenue(s) for the year: _____

1 Fund/Budget Type	2 Revenue	3 Tax Rate
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
Totals		

This resolution is adopted after proper notice and hearing in accordance with UCA 59-2-919 and shall be forwarded to the County Auditor and the Tax Commission in accordance with UCA 59-2-913 and 29-2-920.

Signature of Governing Chair

Signature: _____ Date: _____

Title: _____

Instructions Resolution of Final Tax Rates and Budgets Report 800	Form PT-800 pt-800-inst.doc Rev. 2/01
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Prepared by:	Taxing entities
Statutory reference:	UCA §59-2-919 & 920
Due date:	August 17

General Information

Report 800 shall be completed by taxing entities that have completed the truth in taxation process and have adopted the new budgets and tax rates. This form is forwarded to county auditors and the State Tax Commission by August 17.

Line 1 – Fund/Budget Type

List all of the fund/budget types for this entity.

Line 2 – Revenue

List the final adopted revenue for each budget type.

Line 3 – Tax Rate

List the final adopted tax rate for each budget type.

Totals Line

Add the amounts in columns 2 and 3 and enter the totals here.